



## Additional Information if Pension Adjustment Order Granted

Pensions New Business  
Irish Life Assurance plc  
Lower Abbey Street  
Dublin 1

Client Name

Transferring Plan

Client Date of Birth

 /  / 

Irish Life Reference Number

Has a Pension Adjustment Order (PAO) granting part of the benefits to the member's spouse been made on the benefits under the existing pension arrangement, or on any pension arrangement from which the transferring arrangement received a transfer? or

Yes ☐

No ☐

Does this transfer represent a non-member spouse's designated benefit granted under a PAO?

Yes ☐

No ☐

**If yes to either question a court certified copy of the PAO is needed and we require the additional information below.**

### Where transfer contains member's benefit only

#### Non-member spouse's details

- Name: \_\_\_\_\_
- Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- PPSN (if known): \_\_\_\_\_

#### **Where member's benefit is transferring to an occupational pension scheme or buy out bond:**

Please confirm the non-member's retirement lump sum entitlement (under salary & service route) at date non-member's designated benefit was transferred out: € \_\_\_\_\_

#### Where was non-member spouse's benefit transferred to?

- Type of arrangement \_\_\_\_\_
- Name and address of provider \_\_\_\_\_  
\_\_\_\_\_

- Trustee / employer (if applicable): \_\_\_\_\_
  - Policy number: \_\_\_\_\_
- Amount transferred: € \_\_\_\_\_ Date transferred: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

If you never held the non-member spouse's benefit and cannot answer the questions above then we'll need the following details about the office that originally held the benefits

- Type of arrangement: \_\_\_\_\_
- Name and address of provider \_\_\_\_\_  
\_\_\_\_\_
- Trustee / employer (if applicable): \_\_\_\_\_
- Policy number (if known): \_\_\_\_\_

### Where transfer contains the non-member spouse's benefit only

Irish Life can only accept non-member's benefit into one of the following pension arrangements

- Buy Out Bond / Personal Retirement Bond (PRB)
- PRSA
- Personal Pension

Member spouse's date of birth	____ / ____ / ____
Where transfer is coming from a PRSA at the date of transfer was the member spouse Self-employed <input type="radio"/> An employee <input type="radio"/>	
Does the transfer contain pension funds which do not form part of the amount granted under the PAO?	Yes <input type="radio"/> No <input type="radio"/>
If Yes: How much of the transfer represents the amount granted under the PAO?	€ _____
<b>For transfers to a buy out bond:</b> Please confirm the non-member spouse's retirement lump sum entitlement (under salary & service route) at date of transfer	€ _____

**Where the transfer contains both the member's and non-member spouse's benefit, Irish Life will require these be split as part of any transfer being accepted.**

I confirm the answers to all questions in this form are complete and correct.

Name

Signature

Insurance Company

Date  /  /